

BALANCED METRIC SCORECARD

Actual Results	CTD % \$ Collected	% from top	% of Top Performer	Points	Case Resolution %	% from top	% of Top Performer	Points	Taxpayer Satisfaction	% from top	% of Top Performer	Points	Quality Score	% from top	% of Top Performer	Points	Employee Satisfaction %	% from top	% of Top Performer	Points	Validated Complaints	Points Penalty	Points Total	% \$ Contribution	Weighted Points	Inventory % (Max 20%)	Monthly Placement Estimate
Maximum Points				50				12.5				12.5				12.5				12.5							
PCA 1	10.4%	14.05%	85.95%	43.0	65.00%	4.41%	95.59%	11.9	4.70%	2.08%	97.92%	12.2	94%	2.08%	97.92%	12.2	81.0%	11.96%	88.04%	11.0	2	-4	86.4	15%	12.96	15.25%	33,543
PCA 2	9.8%	19.01%	80.99%	40.5	58.00%	14.71%	85.29%	10.7	4.50%	6.25%	93.75%	11.7	92%	4.17%	95.83%	12.0	82.0%	10.87%	89.13%	11.1	0	0	86.0	13%	11.18	13.15%	28,932
PCA 3	10.1%	16.53%	83.47%	41.7	62.00%	8.82%	91.18%	11.4	4.00%	16.67%	83.33%	10.4	92%	4.17%	95.83%	12.0	82.0%	10.87%	89.13%	11.1	3	-8	78.7	8%	6.29	7.40%	16,287
PCA 4	8.8%	27.27%	72.73%	36.4	50.00%	26.47%	73.53%	9.2	4.50%	6.25%	93.75%	11.7	93%	3.12%	96.88%	12.1	81.5%	11.41%	88.59%	11.1	0	0	80.5	7%	5.63	6.63%	14,575
PCA 5	9.2%	23.97%	76.03%	38.0	49.00%	27.94%	72.06%	9.0	4.00%	16.67%	83.33%	10.4	90%	6.25%	93.75%	11.7	82.5%	10.33%	89.67%	11.2	0	0	80.4	7%	5.63	6.62%	14,559
PCA 6	12.1%	0.00%	100.00%	50.0	68.00%	0.00%	100.00%	12.5	4.80%	0.00%	100.00%	12.5	96%	0.00%	100.00%	12.5	71.5%	22.28%	77.72%	9.7	2	-2	95.2	11%	10.47	12.32%	27,105
PCA 7	9.0%	25.62%	74.38%	37.2	52.00%	23.53%	76.47%	9.6	3.90%	18.75%	81.25%	10.2	87%	9.38%	90.63%	11.3	92.0%	0.00%	100.00%	12.5	0	0	80.7	10%	8.07	9.50%	20,893
PCA 8	11.3%	6.61%	93.39%	46.7	63.00%	7.35%	92.65%	11.6	4.30%	10.42%	89.58%	11.2	92%	4.17%	95.83%	12.0	91.0%	1.09%	98.91%	12.4	0	0	93.8	10%	9.38	11.04%	24,279
PCA 9	8.7%	28.10%	71.90%	36.0	58.00%	14.71%	85.29%	10.7	3.80%	20.83%	79.17%	9.9	90%	6.25%	93.75%	11.7	80.5%	12.50%	87.50%	10.9	0	0	79.2	9%	7.12	8.38%	18,439
PCA 10	9.2%	23.97%	76.03%	38.0	60.00%	11.76%	88.24%	11.0	4.30%	10.42%	89.58%	11.2	88%	8.33%	91.67%	11.5	80.5%	12.50%	87.50%	10.9	0	0	82.6	10%	8.26	9.72%	21,387
PCA Top Score	12.10%				68.00%				4.80%				96.00%				92.00%							100%	85.01	100.00%	220,000
Average Points				41				10.8				11.1				11.9				11.2							

The points are allocated based upon relative performance to the top performer in each perfomance category. The top performer will receive the maximum number of points with each PCA receiving the number of points equla to their relative performance to the top performer. The % of the top score multiplied by the maximum points equals the PCAs score for that category.

The best performer for each category receives the maximum # of points provided the performance level is at or above the performance standard (where applicable). If no contractor performs above the performance standard, the maximum points will be assigned at the performance standard level and allocated accordingly based upon relative performance.

**Definitions:**  
Maximum Points : The maximum number of points that can be allocated to a PCA for the Performance Category. Generally, the Maximum Points will be earned by the PCA that performs at the highest level for the Performance Category.  
PCA Top Score: The top performance score for the category.

% from top: The % rate from the PCA top performer for an individual PCA's performance.

% Top Performer: The % of PCA performance as a ratio to the Top Performers perfomance.

% \$ Collected: The cumulative dollars collected (contract to date) divided by the total dollars placed (excluding placements in the past 90 days)

Case Resolution % : Refer to the definitions contained in the Statement of Work

Taxpayer Satisfaction: average satisfaction score of taxpayers surveyed

Quality Score: Combined Average Score of the PCA from IRS call monitoring, account reviews, and IRS work queu accuracy rate.

Employee Satisfaction %: The rate of employee satisfaction as measured by periodic focus group surveys and the contractor turnover rate for the IRS task order.

Validated Complaints: # of validated Type 2 or 3 complaints

Pts Penalty: Validated Complaints converted to applicable points penalty per Attachment 1, Table D.

Points Total: Total number of points earned for the performance period prior to applying a weighting factor.

% \$ Contribution: \$ collected by the PCA for the performance period divided by the total dollars collected for the performance period

Weighted Points: Points Total multiplied by the % \$ Contribution

Inventory %: Each PCAs Inventory % is determined by dividing the PCAs weighted points by the sum of all the PCAs weighted points. The inventory % will be capped at the inventory maximum. The percentage of inventory in excess of the PCA maximum will be allocated to the next 3 PCAs in 1/3 increments or a lesser number if fewer than 3 PCAs remain for distribution.  
Monthly Placement Estimate: An estimated number of placements for the next month based upon the most current estimates of inventory available and desirable for placement.